



Go Green Heating, AC and Electric

Office Call, Email, and Routing Quick Reference

Main rule: Before calling or emailing back, identify the actual question. If the answer belongs to a department or manager, route it internally first -- then reply to the customer with the correct information.

Simple Intake Process

1. Listen / Read Capture the name, phone/email, job address, and exact question.	2. Route First If the answer is not routine or clear, send it to the correct person before replying.	3. Reply Cleanly After direction is confirmed, call or email back with one clear answer.
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Who Gets What

Topic / Request	Send To	Note
HVAC install lead follow-up	Robin	Robin primary role.
Rebates	Max	Confirm before replying.
Inspections	Max	Confirm status or next step.
Electrical questions	Max	Max coordinates with Joe as needed.
Electrical technical input	Joe via Max	Do not send customer directly to Joe unless instructed.
Payroll	Kelli	Do not guess on pay details.
Employee information	Kelli	Protect privacy.
Robin daily-duty help	Kelli	Office support / prioritization.
Parts ordering	Rob -- CC Mark	Confirm status or ETA first.
Part quotes	Rob -- CC Mark	Do not quote until confirmed.
Marketing / solicitation	Max	Do not schedule, approve, or purchase.
Security concerns	Max	Escalate immediately.
Unsure / mixed topic	Most likely manager	When unclear, send to Max for triage.

Keep It Simple

Do not guess. • Use: "Let me confirm that internally and get back to you." • Then route the question before returning the call or email.	Electrical contact path • All initial electrical communication goes to Max. • Max will communicate with Joe directly when needed.
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Internal quick reference -- designed to keep customer communication accurate, and professionally routed. Since many inquiries come in through the Wix contact form or voicemail text transcription via email, Robin will often be able to see the customer's question before making the initial response. When the question is visible in advance, it should be reviewed and routed internally first, if needed, so the correct answer or guidance is prepared before contacting the customer.